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May 18, 2010

The Honorable Board of Supervisors
County of Los Angeles
383 Kenneth Hahn Hall of Administration
500 West Temple Street
Los Angeles, California 90012

Dear Supervisors:

**RECOMMENDATION TO IMPLEMENT TWO GENERAL RELIEF SSI ADVOCACY PROJECTS AT
THE RANCHO PARK AND SOUTH SPECIAL DISTRICTS (ALL DISTRICTS – 3 VOTES)**

SUBJECT

On February 9, 2010, your Board instructed the Chief Executive Officer (CEO) and the Director of the Department of Public Social Services (DPSS), in collaboration with the Board Offices and County Departments, as necessary, to develop two pilots to contract with one or more community-based organizations (CBO[s]) to conduct Supplemental Security Income (SSI) advocacy for General Relief (GR) recipients in the areas served by the DPSS' Rancho Park and South Special District offices. At that time, your Board instructed that the CEO and DPSS return to your Board within 90 days to request approval of the plan for each of the pilots.

IT IS RECOMMENDED THAT YOUR BOARD:

1. ~~Approve the implementation plan for the Rancho Park District SSI Advocacy Pilot as set forth in Attachment I. This pilot will utilize a market survey process to identify one or more CBOs to assume responsibility for all new referrals to the GR SSI and Medi-Cal Advocacy Program (SSIMAP) within the service area for a two-year term.~~ **APPROVED ON 5-18-2010**

2. Approve the implementation plan for the South Special District SSI Advocacy Pilot as set forth in Attachment II. This project will utilize a market survey process to identify one CBO (or consortium of CBOs) to assist GR SSIMAP Advocates with providing SSI advocacy services to GR participants who are physically and mentally disabled.

The CBO will work closely with 50 percent of GR SSIMAP staff to identify best practices and ways to enhance the existing GR SSIMAP for a two-year term.

PURPOSE/JUSTIFICATION OF RECOMMENDED ACTION

Two of the primary goals of GR Restructuring are to increase the number of GR participants who qualify for SSI and to increase the percentage of GR participants who are approved at the first step of the SSI application process. Various CBOs have experience providing SSI advocacy services, and many CBOs provide related services to indigent adults, including health services, mental health services, money management services, and/or emergency shelter. The two projects will each test a distinct approach to the role of the CBOs utilizing existing resources, without displacing any DPSS SSI Advocates.

DPSS and CBO(s) will utilize the SSI Social Security Disability Insurance (SSDI) Outreach, Access and Recovery (SOAR) approach to SSI advocacy, which is a strategy that helps jurisdictions/agencies increase access to SSI/SSDI for people who are homeless or at risk of homelessness through strategic planning, training and technical assistance. This strategy is promoted by the Social Security Administration and it is used by many successful jurisdictions. DPSS will ensure SOAR training is provided to both DPSS and contracted CBO(s) staff prior to the inception of the SSI advocacy pilots. The contracted CBO(s) will be invited to utilize innovative strategies to demonstrate new approaches geared to achieve an earlier SSI approval based on the initial application. In addition, in the pilot districts, the contracted CBO(s) will play an important role in identifying GR participants who may need the enhanced services that will be offered upon implementation of the various elements of restructuring of the GR Program.

Rancho Park SSI Advocacy Pilot

The Rancho Park SSI Advocacy Pilot will involve contracted CBO(s) staff assisting physically and mentally disabled GR participants with the SSI application process at the initial, reconsideration and hearing levels. CBO(s) will be invited to utilize different innovative strategies to demonstrate new approaches to assisting GR participants to achieve SSI approval. The Rancho Park pilot will utilize a market survey process to identify one or more CBO(s) to assume responsibility for all new GR SSIMAP participants applying for SSI. The existing SSI Advocates will handle the current caseload and assume the function of Liaison to the CBO(s).

The term of the SSI advocacy pilot is two years. The Contractor will provide SSI advocacy services to new participants referred through the GR SSIMAP process at the Rancho Park District office. Currently, there are 38 referrals scheduled per month for new potential SSI applicants.

South Special SSI Advocacy Pilot

The South Special SSI Advocacy Pilot will involve contracted CBO staff who will assist GR SSIMAP Advocates with providing SSI advocacy services to GR participants who are physically and mentally disabled.

The CBOs will work closely with 50 percent of GR SSIMAP staff in the South Special District office to identify best practices and ways to enhance the existing GR SSIMAP to obtain a higher number of SSI approvals in a shorter length of time.

CBOs will be invited to utilize different innovative strategies to demonstrate new approaches to assist GR participants achieve SSI approvals. The South Special pilot will utilize a market survey process to identify one CBO (or a consortium of CBOs) to assist 50 percent of GR SSIMAP Advocates.

The term of the SSI advocacy pilot is two years. The CBO will assume responsibility as a consultant (s) to 50 percent of the GR SSIMAP Advocates. CBO(s) staff will assist GR SSIMAP staff with all services provided in GR SSIMAP. Currently, the South Special GR SSIMAP Program is staffed with two Social Services Supervisors and ten SSIMAP Advocates, who are assigned approximately 166 new referrals per month.

DPSS will work with Department of Mental Health and Department of Health Services to look at the Integrated Service System Team approach and other models to develop protocols on how the DPSS GR SSI Advocates in the South Special District office will work with those departments to maximize success.

Pilot Evaluation

The CEO Service Integration Branch will conduct an evaluation to assess each pilot and the strategies utilized. The CEO and DPSS will submit a comprehensive report to the Board of Supervisors which will include:

- Assessment of the timing and rate of SSI approvals.
- Assessment of the impact of CBO(s) participation.
- Practices utilized and changes to the SSI advocacy system.
- Recommendation of best practices.
- Evaluation of the methodology used by CBO(s).
- Assessment of the collaboration between DPSS GR SSIMAP staff and the CBO in the South Special District office and the effects of utilizing the team approach.

Implementation of Strategic Plan Goals

The proposed recommendations are consistent with the principles of the County-wide Strategic Plan Goal No. 1, Operational Effectiveness, by maximizing the effectiveness of processes, structure and operations to support timely delivery of customer-oriented and efficient public services and Goal No. 2, Children, Family, and Adult Well-Being by enhancing economic and social outcomes through integrated, cost-effective and client- centered supportive services.

FISCAL IMPACT/FINANCING

The CBO(s) serving the South Special Advocacy Pilot will receive a monthly flat fee and the Rancho Park Advocacy Pilot will receive a monthly flat fee and may receive an incentive bonus for the services provided. The amount of that fee will be determined through a market survey process that DPSS will undertake subsequent to the Board's approval of the attached pilot descriptions.

The contracts for the two pilots will be funded with 50 percent net County cost through the GR Anti-homelessness Services account, which was approved by your Board as part of the GR Restructuring Plan. The GR Anti-homelessness Services account is funded by Interim Assistance Reimbursement (IAR) of the GR grant and housing costs for GR participants receiving a housing subsidy who are approved for SSI and prospective GR grant savings for homeless GR participants who receive a housing subsidy and then exit GR with employment, SSI or Veterans' disability benefits.

The remaining 50 percent of the cost of the contracts will be federally-funded through the County Services Block Grant-Health Related.

FACTS AND PROVISIONS/LEGAL REQUIREMENTS

In 1990, pursuant to the settlement agreement in the City of Los Angeles vs. County of Los Angeles lawsuit, the County agreed to assist participants identified as SSI eligible, due to physical or mental disability, with SSI appeal hearing representation services when SSI is denied at the reconsideration level.

The Welfare and Institutions Code Section 17000.5 requires counties to establish a level of aid equal to 62 percent of the 1991 federal official poverty line in the United States Code and to adjust that guideline annually thereafter.

The Welfare and Institutions Code Section 17000.6 allows a county to establish a level of aid which is not less than 40 percent of the 1991 federal official poverty line in the United States Code if it would result in significant financial distress for that county to provide a higher level of aid. Once established, the County may maintain this level of aid if the County requires employable individuals to participate, while on aid, in services equivalent to the California Work Opportunities and Responsibility to Kids Welfare-to-Work program and these employable participants are allowed to receive benefits for at least nine months in any 12-month period.

Since the enactment of the IAR in August 1974, Public Law 93-368 has permitted States and Counties to recover from a person's initial SSI check any County or State funds expended for aid during the time the SSI application was pending.

IMPACT ON CURRENT SERVICES (OR PROJECTS)

Approval of the SSI Advocacy Pilots will enhance the GR SSIMAP through collaboration with the CBOs and will determine the usefulness of incorporating additional resources to achieve higher SSI approval rates. Consequently, approval may result in cost reductions to serve the County's indigent population through collaboration with CBOs. Approval may result in cost reductions related to emergency room visits, in-patient health care, and incarceration, resulting in savings to the County's Health and Human Service and Justice Systems.

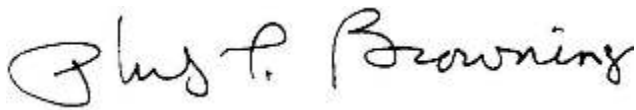
Finally, approval will result in an improved safety net for the County's indigent population, by creating improved access to services for physically and mentally disabled individuals.

CONCLUSION

Approval of the SSI Advocacy Pilots' implementation plans will allow more GR participants to transition to the federal SSI program, which includes Medi-Cal, thereby decreasing County costs by reducing the number of participants receiving GR benefits and utilizing emergency room services without medical coverage, and by increasing future grant savings.

The Honorable Board of Supervisors
5/18/2010
Page 5

Respectfully submitted,

A handwritten signature in black ink, reading "Philip L. Browning". The signature is written in a cursive, flowing style.

PHILIP L. BROWNING
Director

PLB:mk

Enclosures

c: Chief Executive Officer
County Counsel
Executive Officer, Board of Supervisors
Auditor-Controller



**GENERAL RELIEF
SUPPLEMENTAL SECURITY INCOME AND MEDI-CAL
ADVOCACY PROGRAM PILOT
AT RANCHO PARK DISTRICT OFFICE
IMPLEMENTATION PLAN**

General Relief Supplemental Security Income and Medi-Cal Advocacy Program (GR SSIMAP) Pilot services will be provided in the Rancho Park District Office Service Area for GR participants who have been assessed by health/mental health professionals as being potentially eligible for Supplemental Security Income (SSI) based on their physical and/or mental health disabilities. SSI advocacy services will be provided by one or more Community-Based Organizations (CBOs), which will be identified through a market survey process. The primary objective of the GR SSIMAP Pilot is to test whether providing SSI advocacy services to disabled GR participants through a contracted CBO will result in an increase in the number/percentage of GR participants who receive SSI at the initial application level and/or increase in the number/percentage of SSI approvals overall.

BACKGROUND

Currently, SSI advocacy services are offered in all 14 DPSS GR District Offices. SSI Advocates assist participants with completing and filing the SSI application, connecting them to necessary supportive services, and if needed, initiating referrals to the health/mental health provider for services. SSI Advocates assist GR participants' transition from GR benefits (\$221/month) to SSI benefits (\$845/month, effective December 2009). SSI recipients in California also receive Medi-Cal benefits.

On February 9, 2010, the Los Angeles County Board of Supervisors approved a comprehensive plan to restructure the General Relief Program. This comprehensive plan will enhance programs to serve the County's indigent population, with the collaboration of various County departments. This comprehensive plan includes the development of a pilot project for one or more CBOs to provide SSI advocacy services for disabled GR participants in the area served by the Rancho Park DPSS Office.

OVERVIEW OF RANCHO PARK DISTRICT OFFICE SSI ADVOCACY PILOT

The Rancho Park SSI Advocacy Pilot will involve CBO Contractors who will be required to assist physically and mentally disabled General Relief participants with the SSI application process at the initial, reconsideration and hearing level. CBOs will be invited to utilize different innovative strategies to demonstrate new approaches in assisting GR participants to achieve SSI approvals. The Rancho Park pilot will utilize a market survey process to identify one or more CBOs to assume responsibility for all new GR SSIMAP participants applying for SSI.

The term of the SSI Advocacy Pilot is two years. The Contractor(s) will provide SSI Advocacy services to new participants referred through the existing GR SSIMAP process at the Rancho Park District Office. Currently, there are 38 such referrals per month for new, potential SSI applicants.

The Contractor will be required to assist the GR participant throughout the SSI application process, which includes the initial application, reconsideration and hearing levels. The Contractor will be responsible for the following throughout the SSI application process:

- Conducting the initial fact-finding interview with the participant in order to screen for potential SSI eligibility;
- Conducting outreach (if needed) by interviewing the participant via a home visit, or field visit;
- Explaining the SSI application process;
- Explaining the Contractor's role as liaison between the Social Security Administration (SSA) and the GR participant;
- Explaining and assessing the need for supportive services available to the GR participant, including ancillary and transportation expenses;
- Reviewing results of disability assessments provided by the Department of Mental Health (DMH)/Department of Health Services (DHS) or their contracted Public-Private Partnership (PPPs) providers, which are clinic sites across the County that provide primary care services to DHS patients;
- Reviewing medical case records to determine when to file for SSI based on available health/mental health records;
- Referring the participant for a comprehensive evaluation with DMH/DHS or their contracted PPPs, if the contractor determines that such a comprehensive evaluation is needed, and reviews the comprehensive evaluation write-up to determine if it supports the participant's disability before submitting it to SSA.
- Working with DPSS staff to request record retrieval services from DMH, DHS, and/or Los Angeles Sheriff Department (LASD), if needed;
- Assisting the participant in completing and filing the SSI application, and related forms, including the SSDI application (e-filing when available);
- Notifying County staff when a GR participant fails or refuses to participate in the SSI application process, and

- Screening and referring the participant to the GR Housing Case Management (GRHCM) staff for assistance with a housing subsidy (these subsidies can also be utilized to pay for motels as long as the cost does not exceed the maximum subsidy amount).

If the initial SSI application is denied, the first level of appeal is the reconsideration. However, the Rancho Park District is under the SSA Disability Redesign pilot (a step in the SSI application process that was designed to expedite SSI application processing and to achieve an earlier SSI approval for qualified participants), which eliminates the reconsideration step. For the Rancho Park District cases, the only time a reconsideration is requested is when the original application was not filed at a Disability Redesign Office.

COUNTY LIAISON

Currently, the County's SSIMAP Advocate is responsible for all the day-to-day operations of the SSI Advocacy program at Rancho Park. With the implementation of the pilot, the SSIMAP Advocate will remain at the District, continue to serve GR participants with pending SSI applications, and also assume the position of County Liaison, providing assistance to the Contractor. Some of the County Liaison's duties will include, but will not be limited to:

- Referring disabled GR participants who are not referred by LEADER to the Contractor.
- Assisting in obtaining/providing information to/from eligibility and GRHCM staff.
- Interacting with DPSS staff, Management, Line Operations, and Integrated Services Operations for data-reporting purposes on SSI-related issues.
- Acting as a Liaison, as needed, between the Contractor and other County departments.
- Assisting the Contractor to request medical records from DHS, DMH, and LASD to retrieve medical and mental health records on behalf of GR participants to support their disability claim for SSI.
- Assisting the Contractor in processing supportive services requests.
- Acting as a troubleshooter on all GR SSIMAP-related matters.

CONTRACTOR'S QUALIFICATIONS

- At a minimum, Contractor shall have three years of experience, within the last five years, assisting individuals within the Rancho Park District boundaries to complete and file SSI applications.
- At a minimum, Contractor shall have three years of experience, within the last five years, directly providing at least one of the following services: health, mental health, money management, or housing; or has been a Hope Grantee.
- At a minimum, Contractor's SSI advocacy staff shall each have at least one year of experience, within the last five years, assisting individuals in completing and filing SSI applications.

- The Contractor must have had an office within the area served by the Rancho Park District Office for the past 12 months.
- If participants will be required to travel to Contractor's office, this office must be within 60 minutes travel time each way by public transportation from the Rancho Park District Office.

CONTRACTOR (AND SUBCONTRACTOR, IF APPLICABLE) MUST BE A CBO

The Board of Supervisors has instructed DPSS to contract with a CBO(s) to conduct the pilot. The CBO must fall within Sections 501(c)(3) or 501(c)(4) of the Internal Revenue Code (tax-exempt, private nonprofit corporation or association).

The County will utilize a market survey process to identify qualified CBOs. The pilot is scheduled to begin no earlier than January 2011.

EXPECTED CASELOAD

The Contractor is expected to assume responsibility for new GR SSIMAP participants in the Rancho Park District Office. The average flow of new referrals is 38 per month.

REPORTS

The Contractor shall submit reports, as required by the County, concerning GR SSIMAP activities.

PAYMENT STRUCTURE

The County's payment would include a monthly flat fee for the services provided, and may include an incentive bonus for SSI approvals.

IMPACT ON CURRENT SERVICES

SSI Advocacy services will be provided by the Contractor for all of the participants referred for SSI advocacy in the Rancho Park District Office during the term of the contract.



**GENERAL RELIEF
SUPPLEMENTAL SECURITY INCOME AND MEDI-CAL
ADVOCACY PROGRAM PILOT
AT THE SOUTH SPECIAL DISTRICT OFFICE
IMPLEMENTATION PLAN**

General Relief Supplemental Security Income and Medi-Cal Advocacy Program (GR SSIMAP) Pilot services will be provided at the South Special District Office for a total of 50% of new GR participants referred to GR SSIMAP, who have been assessed by health/mental health professionals as being potentially eligible for SSI based on their physical and/or mental health disabilities. One Community-Based Organization (CBO) or a consortium of CBOs, which will be identified through a market survey process, will collaborate with current DPSS GR SSIMAP staff to provide SSI advocacy assistance to 50% of disabled GR participants referred to GR SSIMAP. The primary objective of the GR SSIMAP Pilot is to test whether providing SSI advocacy assistance through a team approach will result in an increase in the number of GR participants who receive SSI at the initial application level and/or an increase in the number/percentage of SSI approvals.

BACKGROUND

Currently, SSI advocacy services are offered in all 14 DPSS GR District Offices. SSI Advocates assist participants with completing and filing the SSI application, connecting them to necessary supportive services, and if needed, initiating referrals to the health/mental health provider for services. SSI Advocates assist GR participants transition from GR benefits (\$221/month) to SSI benefits (\$845/month, effective December 2009). SSI recipients in California also receive Medi-Cal benefits.

On February 9, 2010, the Los Angeles County Board of Supervisors approved a comprehensive plan to restructure the General Relief Program. This comprehensive plan will enhance programs to serve the County's indigent population, with the collaboration of various County departments. This comprehensive plan includes the development of a pilot project for one CBO to provide SSI advocacy assistance in collaboration with GR SSIMAP Advocates, to disabled GR participants, in the area served by the South Special DPSS Office.

OVERVIEW OF SOUTH SPECIAL DISTRICT OFFICE SSI ADVOCACY PILOT

The South Special SSI Advocacy Pilot will involve contracted CBO staff who will assist GR SSIMAP Advocates with providing SSI advocacy services to GR participants who are physically and mentally disabled. The CBOs will work closely with 50% of GR SSIMAP staff to identify best practices and ways to enhance the existing GR SSIMAP in order to achieve SSI approvals in a shorter length of time and to achieve higher SSI approvals overall. CBOs will be invited to utilize different innovative strategies to demonstrate new approaches to assisting GR participants to achieve SSI approvals. The South Special District Office SSI pilot will utilize a market survey process to identify one CBO to assist 50% of the DPSS GR SSIMAP advocates in the South Special District Office.

The term of the SSI Advocacy Pilot is two years.

The Contractor's functions, when working in collaboration with GR SSIMAP Advocates, may include any or all of the following, as well as additional functions that may be proposed by the CBO:

- Conducting outreach (if needed) by interviewing the participant via a home visit, or field visit;
- Assisting the GR SSIMAP Advocates by providing services which will improve GR participants' show-up rates (e.g., providing shuttle services to ensure participants keep their appointments);
- Communicating with other service providers;
- Explaining the Contractor's role as a collaborator when providing SSI advocacy services to the GR participant;
- Reviewing medical treatment history to determine if additional records may be obtained from private medical facilities;
- Reviewing cases to determine ways to strengthen the case records for potential SSI approvals;
- Reviewing cases to determine if additional resources may be provided to the GR participant;
- Acting as troubleshooter on SSI related issues; and
- Providing training to GR SSIMAP staff on issues related to SSI Advocacy (e.g., lawsuits pertaining to SSI).

In addition, the CBO will be required to utilize different innovative strategies to demonstrate new approaches to assisting GR participants to achieve SSI approvals. The CBO will be given the flexibility to develop a system that ensures that GR participants are provided with the support needed to help them get approved for SSI, e.g., meet with GR participants at non-traditional locations, transport GR participants to medical appointments.

SSI PROCESS

For GR participants, if the initial SSI application is denied, the first level of appeal is the reconsideration. However, the South Special District Office is under the SSA Disability Redesign pilot (a step in the SSI application process that was designed to expedite SSI application processing and to achieve an earlier SSI approval for qualified participants), which eliminates the reconsideration step. For the South Special District Office cases, the only time a reconsideration is requested is when the original application was not filed at a Disability Redesign Office.

CONTRACTOR'S QUALIFICATIONS

- At a minimum, Contractor shall have three years of experience, within the last five years, assisting at least 50 individuals in Los Angeles County with the SSI Advocacy process.
- At a minimum, Contractor shall have three years of experience, within the last five years, directly providing at least one of the following services: health, mental health, record retrieval, money management, housing, legal services; or has been a HOPE grantee.
- At a minimum, Contractor's SSI advocacy staff shall each have at least one year of experience, within the last five years, providing SSI advocacy services.
- The Contractor must have had an office located in Los Angeles County for the past 12 months.
- If participants will be required to travel to the Contractor's office, this office must be within one-hour travel time each way by public transportation from the South Special District Office.

CONTRACTOR (AND SUBCONTRACTOR, IF APPLICABLE) MUST BE A CBO

The Board of Supervisors has instructed DPSS to contract with a CBO(s) to conduct the pilot. The CBO must fall within Sections 501(c)(3) or 501(c)(4) of the Internal Revenue Code (tax-exempt, private nonprofit corporation or association).

The County will utilize a market survey process to identify a qualified CBO. The pilot is scheduled to begin no earlier than January 2011.

EXPECTED CASELOAD

The Contractor will assist 50% of GR SSIMAP Advocates with providing SSI advocacy services. Currently, the South Special GR SSIMAP Program is staffed with two Social Services Supervisors and 10 SSIMAP Advocates who are assigned approximately 166 new referrals per month.

REPORTS

The Contractor shall submit reports, as required by the County, concerning GR SSIMAP activities.

PAYMENT STRUCTURE

The County will pay a monthly flat fee for the services provided, and the fee will be specified in the market survey process.

IMPACT ON CURRENT SERVICES

The Contractor, in collaboration with GR SSIMAP Advocates, will provide SSI Advocacy services to a total of 50% of the new GR participants referred to SSI advocacy in the South Special Office during the term of the contract.